USDA Weekly Retail Turkey Feature Activity

Fri. Sep 21, 2012

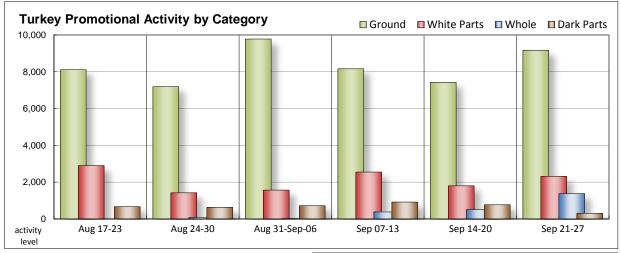
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/21 thru 09/27.

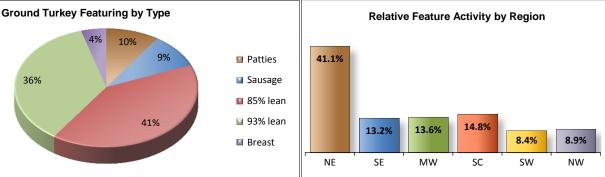
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted; NATIONAL SUMMARY											
	LAST	YEAR									
Feature Rate 1/	40.7%	WEEK of 22,500 tlets	35.4% (WEEK of 22,500 tlets	37.3% of 19,500 outlets 3.9%						
Special Rate 4/	3.	.5%	7.	5%							
Activity Index 2/		,230	12	,490	14,650						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens			380		480						
" - Toms			130	1.61	160						
Frozen - Hens	780				20						
" - Toms	600	0.99			20	1.34					
PARTS:											
Breast:											
Bone-in, whole											
Fresh	190		280		420	-					
Frozen	690	1.83	550	1.71	930	1.63					
Split, bone-in											
Fresh	170				10						
Rotisserie	800	6.96	270		680						
Boneless, whole			110	5.09	620	4.01					
Cutlets	350	4.91	340	5.19	860	4.24					
Cutlets, thin sliced			90	4.99	620	4.06					
Strips											
Tenders	110	4.91	160	5.08	620	4.00					
Marinated Tenders	290	4.41	1,350	4.35	650	4.06					
Drumsticks	60	1.94	280	1.91	120	1.77					
Thighs	40	2.19	100	2.11							
Wings	40	1.72	190	2.02	10	1.49					
Necks	10	1.69			10	1.49					
Smoked Drumsticks	50	2.16	60	1.97	170	2.39					
Smoked Wings	60	2.01	60	1.89	170	2.29					
Smoked Necks	40	1.89	80	1.79	180	1.69					
GROUND TURKEY:	9,170	2.90	7,430	3.26	6,960	3.05					
Patties	870	3.32	580	3.10	390	3.11					
Sausage	860	3.14	2,350	3.25	1,160	3.13					
85% lean	3,730	2.49	1,310	2.31	1,280	2.34					
93% lean	3,300	2.99	2,070	3.11	2,860	2.86					
Breast	410	4.64	1,120	4.71	1,270	4.08					
Rolls (frsh/frz 1 lb.)	190	1.34	280	2.59	410	2.22					
Specialty 5/											
Patties	130	4.86	130	3.49	50	3.99					
93-94% lean	440	4.55	200	3.66	170	4.08					
Breast	20	5.99	20	6.99	310	5.59					
Note: rolls & specialty no	ot included	d in ground	turkey tota	al and weig	hted avera	age.					

This Week's Turkey Feature Highlights

Retail feature activity improves going into the end of the month. Stores are starting to show more whole turkeys in the circulars, could this be an early start to the Thanksgiving holiday season? Offerings slow on fresh bone-in breasts, increase on frozen bone-in breasts; prices are higher. For customers wanting more options, featuring on fresh split breast is active and priced the same as fresh whole bone-in breasts. This is the week to grab a rotisserie breast on the way home; offerings are active and prices are lower. Retailers are not offering many options for boneless white parts; offerings increase on cutlets, decline on the balance of parts. Featuring on dark parts is less active and prices are mostly higher. Promotional activity increases on ground turkey. The 85% lean ground turkey is the most actively promoted and also the lowest priced grind. Deli activity slows. Last week's service deli promotions focused on private brands, this week the focus is on processor brands. Self-service promotional activity declines. The best bet is 16 oz. packages of turkey; offers increase and prices decline.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	IEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 37.1% of 4,000 sampled outlets 4.6% of stores w/ no-price promotions			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,I	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	/V)				
Feature Rate 1/		0 sampled outle	. ,	, , , , ,	00 sampled outle	,				
Special Rate 4/	7.8% of stores w	•		1	v/ no-price promo					
Activity Index ^{2/}		Index = 6,290			/ Index = 2,760				01.01.0	
Activity macx	Price Range	Summar	'V	Price Range	Summar	rv	Activity Index = 1,900 Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	1.49 - 1.89	350	1.70							
" - Toms	1.49	170	1.49							
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.99	190	2.99							
Frozen	1.67 - 1.99	200	1.96	1.49 - 1.97	210	1.93	0.99 - 1.99	80	1.47	
Split, bone-in										
Fresh	2.99	170	2.99							
Rotisserie	4.49 - 7.99	430	5.46	7.99	70	7.99	8.99	180	8.99	
Boneless, whole										
Cutlets	3.99 - 5.49	300	4.99				3.99	30	3.99	
Cutlets, thin sliced	0.00 0.10	000	1.00				0.00		0.00	
Strips										
Tenders							4.99	90	4.99	
Marinated Tenders	4.26 - 4.79	240	4.46	4.26	40	4.26	4.33	30	4.33	
Drumsticks	4.20 - 4.73	240	4.40	4.20	40	4.20	1.29 - 1.69	10	1.51	
Thighs							1.25 - 1.05	10	1.01	
Wings				1.79	10	1.79	1.29 - 1.69	10	1.51	
Necks				1.79	10	1.79	1.29 - 1.69	10	1.69	
Smoked Drumsticks				1.99 - 2.19	50	2.16	1.00	10	1.00	
Smoked Wings				1.99 - 2.19	50	2.16	1.28	10	1.28	
Smoked Necks				1.89	40	1.89	1.20	10	1.20	
GROUND TURKEY:				1.00	70	1.00				
Patties	2.99 - 3.49	650	3.27				2.50 - 3.50	200	3.41	
Sausage	2.55 - 4.12	630	3.07				3.19 - 3.71	170	3.41	
85% lean	1.99 - 3.03	1,450	2.70	1.99 - 2.80	1,610	2.33	1.99 - 3.19	200	2.68	
93% lean	2.84 - 3.79	680	3.19	2.66 - 3.29	630	2.94	2.49 - 3.30	780	2.99	
Breast (99-100% lean)	4.61 - 5.29	310	4.72	4.61	40	4.61	3.99 - 4.99	30	4.44	
Rolls (frsh/frz 1 lb.)				1.49	10	1.49	1.79	50	1.79	
Specialty 5/										
Patties	3.99 - 4.99	120	4.84							
93-94% lean	3.59 - 4.99	400	4.61				3.99	30	3.99	
Breast							5.99	20	5.99	





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (CENTRAL U.S.			SOUT	HWEST U.S.			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
	(AR,AZ,CO,KS,	LA,MO,NM,OK,T	X,UT)		(C	A,HI,NV)						
Feature Rate 1/	, , , , , ,	00 sampled outle	,	27.2% of 2,900 sampled outlets				28.3% of 1,200 sampled outlets				
Special Rate 4/	6.6% of stores w	•			0.0% of stores w/ no-price promotions Activity Index = 850				0.0% of stores w/ no-price promotions Activity Index = 370			
Activity Index ^{2/}		Index = 2,060										
Activity macx	Price Range	Summa	Price	Range	Sumi	marv	Price I	Price Range Summary				
	(\$/pound)		Wtd Avg		ound)	Stores	Wtd Avg	(\$/pc	_	Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens	0.79	430	0.79									
" - Toms	0.79	430	0.79									
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.49 - 1.99	200	1.74									
Split, bone-in												
Fresh												
Rotisserie	5.99 - 8.99	60	8.41		8.99	60	8.99					
Boneless, whole												
Cutlets	5.17	20	5.17									
Cutlets, thin sliced	0		0									
•												
Strips Tenders	4.55	20	4.55									
Marinated Tenders	4.55	20	4.55						3.99	10	2.00	
Drumsticks	2.19	40	2.10							10		
	2.19	40 40	2.19 2.19						1.39	10	1.39	
Thighs									4.00	4.0	4.00	
Wings	2.19	10	2.19						1.39	10	1.39	
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:					2.00	20	2.00					
Patties	0.00	00	0.00		3.99	20						
Sausage	3.02	30	3.02	4.00	3.19	30						
85% lean	2.23 - 2.49	260	2.48		- 2.40	210		2.22	0.00	0.10	0.00	
93% lean	2.89 - 3.08	390	2.90	2.80	- 3.75	510	2.94	2.80		310		
Breast (99-100% lean)	0.00 4.00	100	4.40					3.99	- 4.29	30	4.07	
Rolls (frsh/frz 1 lb.)	0.99 - 1.89	130	1.16									
Specialty ^{5/}					4.00		4.00					
Patties					4.99	10						
93-94% lean					3.99	10	3.99					
Breast	Manhatina Camiaa Daul	ture Nacoleat Naco	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	(202) 720 60				da/			2 -4	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Sep 21, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/21 thru 09/27.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RΥ			NORTHEAST U.S.			SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)				
	79.1% o	f 22,500	71.7% o	f 22,500	81.6% c	f 19,500	·						
Feature Rate 1/	sto	res	sto	res	sto	res	94.7% of 4,400 sampled outlets			84.3% of 6,000 sampled outlets			
Antivity Index 2/	42	470	F2	600	40	040	Activity Ind	ex = 12,990		Activity Index = 8,970			
Activity Index 2/	43,	470	52,	680	40,	840	Price Range	Sumr	nary	Price Range	Price Range Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
SERVICE DELI - Turkey													
Category 1													
Processor Brand	5,720	8.05	4,120	7.91	5,720	7.85	5.99 - 9.99	3,170	7.60	5.99 - 9.99	1,520	8.89	
Private Brand	1,510	7.20	2,540	7.48	4,140	7.56	6.99 - 7.99	640	7.59	5.99 - 6.99	200	6.74	
Category 2													
Processor Brand	5,020	6.12	3,620	5.85	7,310	6.06	4.99 - 6.99	1,060	6.24	4.99 - 6.99	460	5.99	
Private Brand	2,180	6.22	7,170	6.54	5,290	6.39	5.98 - 6.99	720	6.06	4.98 - 6.99	630	6.37	
Category 3													
Processor Brand	1,360	3.89	930	4.17	950	3.92	2.99 - 4.99	240	4.66	2.48 - 4.99	200	3.95	
Private Brand	1,700	4.72	3,110	5.35	880	5.28	2.98 - 4.99	230	4.25	3.99 - 4.99	130	4.33	
Turkey Ham	050	0.40	500	0.50	400	0.00	0.00 4.00	400	4.40	0.40	00	0.40	
Processor Brand	350	3.40	530	3.58	120	3.30	3.98 - 4.99	100	4.16	3.49	30	3.49	
Private Brand			40	3.98									
Turkey Pastrami	000	0.07	500	0.04	400	0.75	0.00 4.00	400	4.40	0.40		0.40	
Processor Brand	330	3.97	520	3.84	430	3.75	3.99 - 4.99	180	4.18	3.49	30	3.49	
Private Brand					60	3.77							
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,930	7.20	3,620	7.66	3,250	7.52	4.48 - 8.99	1,550	7.58	6.99 - 7.39	1,510	7.05	
Private Brand	1,440	6.97	2,570	6.86	1,680	7.00	5.98 - 6.99	1,300	6.98	6.99	70	6.99	
Category 2													
Processor Brand	470	6.28	410	5.69	180	4.88				4.99 - 6.98	250	6.52	
Private Brand	160	5.99	1,680	5.17									
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	7,440	2.96	8,500	2.99	8,980	3.09	2.50 - 3.99	1,510	3.21	2.19 - 3.50	1,560	3.09	
Private Brand	1,720	3.05	2,130	3.03	1,020	3.21	2.99 - 3.99	200	3.58	2.88 - 3.00	470	2.98	
Turkey 16 oz	1 010	4.05	1.070	E 47	450	6.00	2.40 5.00	670	F 04	2.40 4.00	120	4.50	
Processor Brand	1,810	4.85	1,070	5.17	450	6.06	3.48 - 5.99	670	5.01	3.48 - 4.99	130	4.59	
Private Brand Chicken 7-10 oz													
Processor Brand	6,610	2.94	7,990	3.00	7,460	3.10	2.50 - 3.99	1,220	3.11	2.50 - 3.50	1,310	3.12	
Processor Brand Private Brand	,	3.05	2,130	3.00	920	3.10	2.50 - 3.99	200	3.11	2.50 - 3.50 2.88 - 3.00	470	2.98	
Private Brand	1,720	3.05	∠,130	3.03	920	ა.∠ა	2.99 - 3.99	200	ა.ეგ	2.00 - 3.00	4/0	∠.9ŏ	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,F	H,NV)	(AK,ID,MT,	OR,WA,WY)		
Feature Rate 1/	74 0% of 4 000	sampled outlets	64.9% of 4.000) sampled outlets	67.0% of 2,900 s	sampled outlets	87.3% of 1,200 sampled outlets			
		•		ndex = 5,420	·	dex = 3,480	Activity Index = 2,610			
Activity Index 2/	Activity Index = 10,000 Price Range Summary		Price Range	Summary	Price Range	Summary	Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound) Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(4.1)	J J	(44)	J	(+-1)	3	(*-1 /	J		
Category 1										
Processor Brand	6.49 - 10.49	380 7.43	5.99 - 8.49	620 8.60			6.98 - 11.99	30 8.58		
Private Brand	5.99 - 7.49	130 6.88	5.99 - 7.99	540 6.98						
Category 2										
Processor Brand	4.99 - 6.99	1,570 5.71	4.97 - 6.99	900 6.01	6.99	550 6.99	4.99 - 6.99	480 6.49		
Private Brand	4.48 - 6.28	550 5.95	5.98 - 6.99	80 6.62			6.99	200 6.99		
Category 3										
Processor Brand	2.69 - 4.99	680 3.61	2.99 - 3.99	40 3.80	2.99 - 3.99	200 3.84				
Private Brand	3.99 - 4.99	110 4.89	4.49 - 4.99	360 4.83	4.49 - 4.99	550 4.73	4.99	320 4.99		
Turkey Ham	0.40	00 000	0.40	70 0.54	0.40	400 000				
Processor Brand	2.49 - 2.99	30 2.80	2.19 - 3.99	70 3.51	2.19 - 3.29	120 2.82				
Private Brand										
Turkey Pastrami	0.00 0.40	20 2.05	2.00 4.00	70 405			0.00	00 000		
Processor Brand	2.99 - 3.48	30 3.25	3.99 - 4.99	70 4.25			2.98	20 2.98		
Private Brand										
SERVICE DELI - Chicken										
Category 1	5 40 000	500 004	5.00 0.40	0.40	7.40	40 740				
Processor Brand	5.49 - 8.99	590 6.81	5.99 - 8.49	240 6.76	7.49	10 7.49	6.99	30 6.99		
Private Brand	5.98 - 9.99	40 7.25	5.98	30 5.98						
Category 2 Processor Brand	3.99 - 6.99	210 6.05	4.99	10 4.99						
Private Brand		160 5.99	4.99	10 4.99						
SELF-SERVICE DELI	5.99	160 5.99						_		
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.00 - 3.99	1,990 2.76	1.98 - 2.50	1,130 2.67	2.49 - 3.99	920 3.06	2.48 - 3.99	330 3.06		
Private Brand	2.88 - 3.00	620 2.91	2.50 - 3.00	160 2.62	2.10 0.00	0.00	3.00 - 3.50	270 3.37		
Turkey 16 oz	2.00	020 2.0.	2.00	100 2.02			0.00	2.0		
Processor Brand	3.99 - 4.99	380 4.66	3.49 - 3.99	60 3.95	4.99	240 4.99	3.99 - 5.49	330 4.90		
Private Brand										
Chicken 7-10 oz										
Processor Brand	2.00 - 3.99	1,910 2.77	1.98 - 2.67	950 2.69	2.49 - 3.99	890 3.03	2.48 - 3.99	330 3.06		
Private Brand	2.88 - 3.00	620 2.91	2.50 - 3.00	160 2.62			3.00 - 3.50	270 3.37		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)